

Editing and Adding New Employees

Introduction

The Employee Management page can be used to add a new employee to the system or edit a current one. To reach the Employee Management page, click on The Admin dropdown on the side menu then click on Employee Management. Clicking on the three bars on the top left corner on the page expands the side menu to show more detail allowing for Easier Navigation.

The screenshot shows a software interface with a top navigation bar and a side menu. A callout points to the menu icon (three horizontal lines) in the top left corner, with the text "Click on Menu Icon". The main content area includes a date selector for "11/14/2025", buttons for "Today", "Previous", "Next", "Coversheet", and "All Covers", and a "Daily Notes" section. Below this is a "Scheduler" section with a time grid from 11:00 AM to 4:30 PM. A task is scheduled from 1:00 PM to 4:00 PM, labeled "Heating System Tune-Up". At the bottom, there is a table with columns: Tech, JO, Start Time, Arrival Window, Dispatched, Start, Finished, Status, Labels, Dispatch Notes, Estimate, Name, and Ad. The table contains two rows of data.

Tech	JO	Start Time	Arrival Window	Dispatched	Start	Finished	Status	Labels	Dispatch Notes	Estimate	Name	Ad
N/A	N/A		1:00 PM-4:00 PM				Created	Heating System Tune-Up		3.82		Da
N/A	N/A		6:00 PM-9:00 PM				Created	Heating System Tune-Up		1.5		Rid

Service Board

11/14/2025

Part Requests 48

Daily Notes

Today

Previous Next

Coversheet All Covers

Incomplete 131

Unchecked 36

Scheduler

Click on Admin

100%

11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM 3:00 PM 3:30 PM

UN Unassigned

Heating System Tune-Up

Customer Search Technicians Off-Duty Staff (0)

Tech	JO	Start Time	Arrival Window	Dispatched	Start	Finished	Status	Labels	Dispatch Notes	Estimat
N/A	N/A		1:00 PM-4:00 PM				Created	Heating System Tune-Up		3.82
N/A	N/A		6:00 PM-9:00 PM				Created	Heating System Tune-Up		1.5

v2.12.3

Service Board

11/14/2025

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Previous Next

Coversheet All Covers

Incomplete 131

Unchecked 36

Scheduler

Click on Employee Management

100%

11:00 AM 11:30 AM 12:00 PM 12:30 PM 1:00 PM 1:30 PM 2:00 PM 2:30 PM 3:00 PM 3:30 PM

UN Unassigned

Heating System Tune-Up

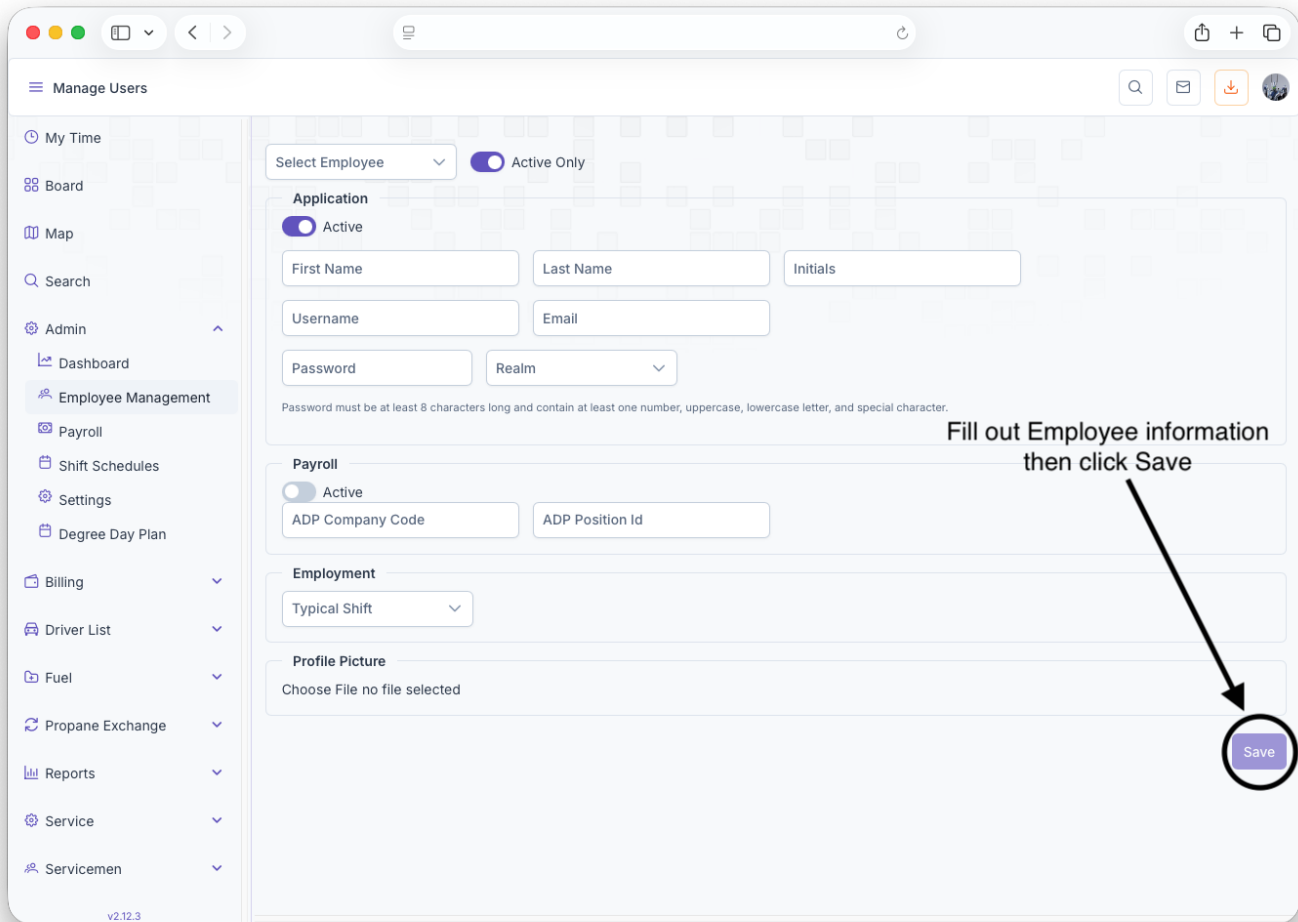
Customer Search Technicians Off-Duty Staff (0)

Tech	JO	Start Time	Arrival Window	Dispatched	Start	Finished	Status	Labels	Dispatch Notes	Estimat
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v2.12.3

Editing or Adding a New Employee

The Employee Management page will then generate. From here clicking on the Select Employee dropdown gives the option to select a current Employee and edit their account or clicking on add Employee at the bottom of the dropdown clears all fields to allow data entry of a new employee. The page will then show the Employee Status, Their Application, Payroll, Employment and Profile Picture



- Status: Toggling status shows if the employee is currently active or inactive\
- Application: Here is where the employees information is filled out: First Name, Last Name, Initials, Username, Email, Password and Realm
- Payroll: The Employees payroll status can be toggled to active or inactive, can fill out the ADP Company Code and the ADP Position ID
- Employment: Shows location of where the employee is working and the time
- Profile Picture: clicking on Choose File allows a picture of the employee to be uploaded to their account

Upon finishing filling out The Employees information, clicking on the Save button will save the employees information to the system. Filling out a blank page can be used to add a new employee to the system and changing the information of a currently selected employee allows the employees information to be edited

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